
Maryland Department of Natural Resources

Operating Budget Response

Fiscal Year 2005

Part I: Operating Budget Analysis

Wetlands Acreage Restoration (Page 9)

Fluctuation in wetlands restoration acreage is due to State Highway Administration funding no longer available and other cost containment reductions.

Chesapeake 2000 Commitments(Page 9)

Estimate is based on commitment due dates. DNR is responsible for a total of 58 commitments for the Chesapeake 2000 (C2K) agreement. Progress in achieving all the C2K commitments is tracked by DNR's Watershed Services unit. Based on actual progress made as well as upcoming commitment due dates, the agency anticipates achieving 43 of 58 commitments in 2005. (Note: many of the commitments considered "met" are those requiring ongoing efforts.)

Using MFR to Measure Land Preservation Progress (Page 10)

The MFR process establishes a consistent tracking system whereby the Department's land conservation Programs can evaluate their progress. Through this evaluation, the programs can identify areas of strength as well as those areas that may need adjustment to improve the Department's ability to reach its goals of natural resource conservation and enhancement. While daily land acquisition decisions made by the acquisition programs are much more complex than the MFRs would suggest, the MFRs alone do provide basic snapshots of program activity that may be helpful to those requiring only general knowledge of program activity. MFRs provide useful data, when combined with historical insights and programmatic expertise, to evaluate past performance and plan for the future.

Using MFR to Measure Multi-Agency Environmental Progress (Page 10)

The Maryland Departments of Natural Resources, Agriculture and Environments have programs that make major contributions to managing the State's natural resources and the environmental health of our air, water and land. The Chesapeake Bay 2000 Agreement provides a set of performance goals for determining how well the state is managing Maryland's environment. Progress is currently being tracked by DNR, which is the lead state agency for the restoration of the Chesapeake Bay. To create a summary MFR on the environmental progress would be a duplicative effort of our Chesapeake 2000 goal tracking.

Part II: Issues

1. Recommendations of the Commission on the Structure and Efficiency of State Government

For the most part, agency leadership is still working with the Governor's Office to determine appropriate courses of action on all Mandel Commission recommendations impacting DNR.

- **Chesapeake Bay Governance:** Agency leadership is working with the Governor's office to determine the best course of action for creation of a Bay coordinator position and reconstitution of the Chesapeake Bay Cabinet through a new executive order.
- **Power Plant Research Program:** No final determination has been made, however, the program is under review in the General Assembly.
- **Forestry Programs:** The Secretaries of Natural Resources and Agriculture have jointly reviewed these programs and are communicating with the Governor's office. No final determination has been made.
- **Conservation Reserve Enhancement Program:** The Secretaries of Natural Resources and Agriculture have jointly reviewed these programs and are communicating with the Governor's office. No final determination has been made.
- **Law Enforcement:** Proposed Law Enforcement Reorganization is discussed in detail under item 5.

2. Environmental Trust Fund Impact

The Power Plant Research Program (PPRP) coordinates with many State agencies, not just the Public Service Commission (PSC) and the Maryland Energy Administration (MEA). At a minimum this includes the Departments of Agriculture, Business and Economic Development, Environment, Natural Resources, Planning, Transportation, as well as the Energy Administration. The nature of the coordination is dependent on the following two major aspects of the Program:

Licensing: When a power plant or transmission line application is filed in Maryland, PPRP is responsible for the coordination of the Executive Branch position

before the regulatory agency, the PSC. A licensing case before the PSC (the CPCN or Certificate of Public Convenience and Necessity) typically includes a detailed environmental review of the proposed facility and a consolidated letter of recommendation from the Executive Branch to the Commission with specific conditions to assure the facility will operate with minimal environmental impact. At a minimum this includes the Departments of Agriculture, Environment, Business and Economic Development, Planning, Transportation and the Maryland Energy Administration. Each of these agencies has designated a contact within their agency responsible for providing input into PPRP's environmental review document and draft recommendations. These contacts work with PPRP throughout the licensing process to assure that input from their respective agencies in the adjudicatory process before the PSC. Ultimately this work is incorporated in the letter of recommendation signed by the Secretaries of each of the above agencies. In addition, PPRP coordinates with and includes comments from other interested agencies depending on the particulars of the project under review. An example of this is the Maryland Historic Trust (MHT) whose comments and concerns are included in all environmental reviews.

Research and other special projects: In addition to the numerous reviews of proposed power plants that PPRP conducts each year, it also conducts research projects in support of current and future licensing activities as well as technical studies to satisfy technical needs of other agencies. All agencies are given the opportunity to annually review contractor work scopes and request the inclusion of specific projects within those scopes. Once projects are underway it is common to involve other agencies in the detailed design of the scope and in critiquing the project output. As an example, for a recent project that creates a GIS tool to identify potential areas of the state amenable to power plant development, an advisory group was established with representatives from the Public Service Commission staff, the Departments of Environment, Business and Economic Development, Planning and The Energy Administration as well as various representatives from counties and other interested groups. This assistance extends beyond the so called 'power plant sub-cabinet'. For example, PPRP conducted a technical study for the Maryland Environmental Service evaluating the feasibility of using chicken litter as a fuel at their Eastern Correctional Institute Cogeneration Facility. This contractual arrangement also allows PPRP to respond to immediate requests from various agencies.

For example, PPRP was recently able to satisfy an immediate MEA need to do a technical review of the proposed renewable portfolio legislation (HB 1308). As a second example, PPRP is in the process of conducting an economic evaluation of various air control strategies to provide MDE input for comments due at the end of March for a proposed Interstate Air Quality Rule. Both of these tasks involve power plant impacts. Additionally, when the Public Service Commission needed a technical witness to provide testimony before the Federal Energy Regulatory Commission (FERC), PPRP was able to provide that assistance. These examples show the full coordination of the ETF with other agencies within the state.

Diversification of the ETF: The above discussion illustrates that ETF revenues are already quite diversified with respect to the analysis of power plant impacts and issues. Additionally, the ETF provides both money and contractual support to several agencies. In particular, MDE directly receives approximately \$750,000 annually support of air related programs. This is in addition to specific contractual project support that can exceed \$500,000 per year. MEA receives \$250,000 annually directly from the ETF in addition to specific project support that can amount to another \$250,000. While the Public Service Commission does not receive a direct budget allocation, technical studies are performed to help the agency meet its mandates. For example, PPRP conducts an annual statewide load forecast that the Commission uses to assist it in satisfying its mandate to assure adequate electricity supplies.

To further diversify the use of the ETF revenue would require amendments to the existing law to allow such activities as on-the-ground natural resource protection efforts, energy incentive programs, or advocacy programs. Additionally, as noted by the analyst, the ETF is fully subscribed. Taking on additional mandates would require further legislation to raise the surcharge cap well beyond its present level as well as expanding its mandate which we are not advocating. There would likely be industry opposition to expansion of the ETF in this manner.

Outcome Based Measurements: The analyst correctly pointed out the difficulty in determining via quantified measures of performance if the PPRP is achieving its goal of ensuring that MD meets its electricity demands at reasonable costs and on reasonable schedules while protecting natural resources. In the present DNR Strategic Planning Exercise, PPRP has identified its unit

objectives as 1) completing comprehensive reviews of all applications for new and modified power plants and transmission lines, including federal permits for nuclear plants and hydro plants to provide conclusions and recommendations for management and regulatory activities, 2) to identify impacts of electrical energy production, transmission, and distribution on natural resources and public health and safety in MD and 3) assess the adequacy and environmental soundness of MD's long term electric energy supply. These will form the basis for a discussion of new outcome-based methods to measure PPRP's impact.

Additional Comments–Expenditures: Exhibit 5, although fundamentally correct, deserves some discussion. The amount in Row 3 for the PPRP includes a negotiated agreement with MDE that can exceed \$750,000, depending upon MDE's specific needs for that year (described above). Likewise, the amount in Row 4 entitled 'Admin costs/other programs' covers several programs within DNR. The Bay/tributary monitoring is the largest of this group, averaging \$2,100,000. While this is only a portion of the overall bay/tributary monitoring costs incurred by DNR, it is the portion related to the environmental assessment of a number of power plants with once through cooling systems located on the Bay and its tributaries.

3. Asian Oyster Environmental Impact Statement

The State of Maryland and the Commonwealth of Virginia are not duplicating efforts to research a proposed introduction of a reproducing non-native oyster to the Chesapeake Bay and tributaries. Maryland is taking the lead and is responsible for Maryland waters. Virginia has invested eight years and \$3.5 million in research. The federal agencies recognize Maryland and Virginia as the lead agencies for implementation of the EIS process. Research conducted in Virginia since 1996 focused on evaluating the potential for using sterile non-natives for aquaculture through a number of field trials under funding available to the Virginia Seafood Council. This new research largely being funded by DNR is focused on funding researchers and modelers to address the ecological and economic risks and benefits associated with the Environmental Impact Statement (EIS), specifically with introducing a reproductive (diploid) non-native oyster into the Bay. These projects were developed jointly with Virginia to avoid duplication and build upon the research already conducted in Virginia. Further, the states are working closely on these research projects to take

advantage of the different environmental and biological parameters (salinity, temperature, productivity) found at each states' research institution. The Governor of Virginia budgeted \$200,000 for the EIS process. The Potomac River Fisheries Commission is providing \$100,000.

4. DNR Special Funds Work Group Recommendations

Purpose Of Workgroup

The DNR Special Fund Workgroup was created by the 2001 Legislative Session and was charged with studying the statutory requirements of special funds managed by DNR; specifically:

- the appropriate level of administrative expenses to be deducted from each special fund;
- whether any streamlining measures could be taken to reduce DNR's special fund tracking burden; and
- whether DNR is using its special funds appropriately.

The workgroup did not meet until 2003 to address the specific issues raised in the 2001 Session.

Workgroup Members

Delegate Norman H. Conway (Co-chair)

Delegate George W. Owings III

Senator John C. Astle (Co-chair)

Senator Lowell T. Stoltzfus

Laura Hilden, Department of Budget and Management

Steve Powell, Department of Natural Resources

Products/Recommendations

(Legislation To Be Sponsored By Co-Chairs)

Administrative Expenses

Codify the Department's existing practice of charging administrative expenses of Office of the Secretary to the various special funds. Exceptions to be made for special funds with restrictions by statute (e.g. POS) and escrow situations (e.g. Ocean Beach Replenishment Fund). Additionally, the charging of administrative fees to the Waterway Improvement Fund will be phased-out over a five (5) year period by the introduction of budget language. The loss of WWI administrative budget in Office of the Secretary is to be offset by a corresponding increase in General Funds in the CSB.

The calculation of the administrative fee will be based on a recognized accounting methodology to include review by DBM and review/comment by the budget committees.

Streamlining of the Various Funds

There will be no consolidation or changes to the existing special funds administered by the Department.

Statutory Language for DNR's Special Funds

The workgroup recommends a number of technical adjustments to the Natural Resources Article for compliance with recognized and appropriate requirements for all special funds.

Fee Recommendations

The work group recommends the creation in statute of a commission to develop fee recommendations that will be implemented through the administrative regulations process. Presently, the majority of DNR fee increases require the introduction of legislation.

Members of the fee commission could include the chairmen of existing advisory groups such as the Boat Act Advisory Committee, Forest Advisory Commission, Wildlife Advisory Committee; etc; two (2) members of the general public; and, a representative from the Department of Budget and Management.

Waterway Improvement Fund

(Legislation to provide additional funds to projects in addition to phased reduction of WWI administrative charges).

- Eliminate annual transfer of \$225,000 to the General Fund that was implemented when the Comptroller's Office was involved in the collection of excise tax revenues.
- Eliminate annual transfer of \$350,000 to the State Boat Act Fund that was provided for enforcement of the State Boat Act.
- Phase-in an increase to the current cap of \$1 million for funds provided to Natural Resources Police for law enforcement. The two (2) year phase-in to funding of \$2 million would place the Department in compliance with the statutory requirement as the existing budget of WWI funds in NRP for law enforcement is approximately \$1.7 million.

5. Proposed LEO Reorganization

DLS recommends that DNR brief the committee on the proposed reorganization process and whether implementing legislation is forthcoming. DNR should discuss the anticipated fiscal and programmatic benefits and challenges associated with implementing this proposal and whether it intends to implement the Mandel Commission's procurement, communications, training, and coordination recommendations for improving the overall efficiency of State law enforcement.

DLS also recommends budget bill language requiring DNR and DBM to submit a report to the committee by October 1, 2004, providing detailed information about the proposed implementation process and timeline as well as the estimated cost savings.

DNR and DBM have been working together to develop a plan to merge the Natural Resources Police (NRP) and the State Forest and Park Service Rangers. DBM is drafting implementing legislation to allow the SFPS law enforcement officers that no longer will be required to be sworn police the ability to stay in their existing pension systems as well as arranging an initial meeting with appropriate union representatives to brief them on the plan in order to begin good faith negotiations. Anticipated fiscal and programmatic benefits are as described in the report to the Joint Chairmen and include 1) potentially lower costs in purchasing equipment and uniform items through larger quantity orders, 2) streamlined training at one location, 3) a wider variety of assignments and duty stations, 4) improved asset mobility and long-range planning, and 5) an organizational structure allowing for demographic, geographic, and seasonally strategic workforce allocation.

Also per the Joint Chairmen's report, budgetary benefits from removing law enforcement responsibilities from the SFPS include savings resulting from reduced salaries, retirement contributions and training costs of approximately 40% for the same number of civilians replacing Rangers.

Specific details of benefits gained from the merger are premature at this time and can only be calculated after union negotiations have been completed. DNR and DBM will work together to meet the DLS stated October 1, 2004 deadline for providing detailed information on the merger implementation process.

6. Establishing a Chesapeake Bay Recovery Fund

- No donations have been offered DNR since this was announced.
- DNR believes that offering Maryland citizens an opportunity to help restore their Bay in a direct and concrete way is an appropriate role for state government. The best precedent for such an opportunity lies in the enactment of the legislation that created the Chesapeake Bay Trust. The solicitations for contributions to Maryland Public Television are similar in nature in that they too improve citizens' ability to learn and contribute to their own community.
- For the most part, existing Bay related organizations are focused on education and volunteer based smaller scale projects. The Recovery Fund will be the only fund solely dedicated to the implementation of *large-scale* Bay restoration projects. (The Recovery Fund will solicit other Bay organizations participation in these efforts.)
- When seeking donations and gifts, DNR will offer potential donors a menu of large-scale, strategically planned projects from which to choose. The projects will be scientifically based and directly supportive of the state's environmental objectives.
- The Recovery Fund will offer the existing "fragmented programs" and organizations an opportunity to participate collectively not only with DNR but with other Bay groups. At the present time no such vehicle for implementing large-scale projects with multiple organization involvement exists.

Part III: Recommended Actions

1. Report on Law Enforcement Merger

Agency Concur.

2. Report on Waterway Improvement Fund

Agency Concur with proposed budget bill language. However, the agency is concerned about possible budget reconciliation bill language laying out a schedule for reducing the administrative cost rate. DNR would object to DLS's recommendation that the Budget Reconciliation Act be amended to include language codifying a step-down in administrative costs. The Special Fund workgroup agreed that budget bill language should be used to convey the intent of the workgroup, not an amendment to the Waterway Improvement Fund statute.

3. Vehicle Funding Allocations

Agency Concur.

4. NRP \$229,438 General Fund Reduction and Deletion of three pins associated with Maryland Independence.

Concur with \$50,000 GF reduction. Only \$50,000 of the operating funds for the Maryland Independence is general funds. The three positions are specially funded and were transferred to critical vacant positions elsewhere in NRP.

The State recently sold the Maryland Independence. Consequently, it is appropriate for some of the operating costs of the vessel to be reduced in DNR's budget. However, only \$50,000 of the budget for the Independence is generally funded. The balance of the funding is special funds. The analyst's recommendation would require the NRP to cut approximately \$180,000 in general funds from elsewhere in its budget, in addition to abolishing 3 positions.

Currently, the three positions that were assigned to the Independence were re-assigned to mission-critical positions within NRP. As the department has fewer vacancies than the turnover requirement, there is no money associated with the positions that would be abolished.

5. Reduce funding for Wildlife & Heritage Service by \$470,573 in General Funds.

Oppose. The recommended cut will drastically impact the department's ability to respond to wildlife nuisance calls and review of permit applications for potential impacts from development on endangered species, as well as other services.

The stated justification for this reduction, which will cut all remaining general funds from this program, is that recent hunting license fee increases will allow the Department to offset this cut with special funds.

The Wildlife and Heritage Service (WHS) provides benefits to all Marylanders and all its wildlife, through conservation and management programs. Hunters, the first conservationist, don't mind paying their fair share, but it is simply inequitable to single out one user group to pay the freight for all.

Moreover, the long-term ability of the Department to do wildlife management is seriously threatened. With growing urbanization and stable hunter participation, revenue from license sales is constant absent fee increases. As conflicts between Marylanders and deer, bear and other species grow, license dollars will simply not be sufficient.

The budget of the Natural Heritage Program, a division within Wildlife and Heritage that has nothing to do with game species, is some 1.8 million dollars as proposed for FY 05. WHS spends thousands of dollars to assist suburban homeowners with nuisance wildlife problems: the unit maintains a 24/7-response team for black bear problems and reviews over 2,000 permit applications for potential impacts from development on endangered species. These programs will be directly impacted if this recommendation is approved.

The model for the success of wildlife management in the United States during the past 100 years is one of "user-pays, user-benefits". Maryland hunters, through license fees and a federal excise tax on sporting equipment, have been the primary supporters of wildlife programs, including those for non-game species. In fiscal year 05, they will contribute \$8 million to the Department for this purpose.

Moreover, from a business sense, investment in wildlife programs makes economic sense. Survey data from the US Fish and Wildlife Service states that 1.9 million

people participated in wildlife-associated recreation in Maryland in 2001; 8 percent of these were hunters. If non-hunters contributed to wildlife programs, at the same rate as hunters, the budget of the Wildlife and Heritage Service would be \$100 million instead of \$9 million.

A 1991 economic study of wildlife watchers in Maryland showed they contributed \$460 million in total economic activity to the State, and in so doing generated \$15 million dollars in State sales and income tax revenue. The analogous economic benefit of hunting is \$300 million in total economic benefit and \$12 million in State tax revenue. Wildlife is bringing at least \$27 million dollars into the State treasury. The user-pays/user-benefits model would direct at least a portion of this income generated back into the resource.

During the 2002 session of the General Assembly, the sportsmen stepped up to the plate, and helped us advocate for a modest license fee increase, the first since 1989.

Despite their efforts, they have seen the general fund appropriation to WHS decline from \$2.9 million dollars in fiscal 03 to a proposed zero under this recommendation, and they will receive no benefits from the license fee increase.

6. Reduce General Fund appropriation for the NRP by an additional \$1.0 million contingent on enactment of HB 181 (State Boat Act Funds).

Oppose. The Department proposed boating fee increases because the fees had not been adjusted in 30 years, had not kept pace with program costs, and had caused other special funds to be burdened with program costs for which the boating fees should be responsible. By cutting general fund support for law enforcement, other special funds in the department will continue to have to support activities that the boating fees should cover.

DNR has tried on two other occasions to increase boating fees in Maryland. For instance, to register a vessel in Maryland costs exactly \$12 a year (\$24 every two years) — a fee set more than 30 years ago. If the vessel registration fee was indexed to inflation, the bi-annual cost to register a vessel would be \$93.50. The proposed legislation only increases the fee to \$40 and industries have come out and spoken in favor of the legislation—if the funds are used for the programmatic

purposes intended. The industry will likely not support the fee increases were the increases only used to bolster the General Fund and not go to programmatic expenses.

As a result of decades of no fee increases, the contribution that boating fees makes to the department in funding the NRP, the Licensing and Registration Service, and overhead are supplemented by other fees imposed by the department that have been increased either through fee adjustments or vessel sales. By removing general fund support from law enforcement, this trend will continue. Law enforcement salaries are extremely expensive to maintain over time with special funds that require statutory changes to increase fees. The proposed fund switch increases by nearly 25% the special fund support for the NRP's Field Operations program. To keep pace with law enforcement personnel costs, the boating fees will have to be regularly increased. As it has been 30 years since the last fee increase for some boating fees, regular increases seem unlikely.

Furthermore, the boating fees legislation was also designed to take part of the administrative burden born by the Waterway Improvement Fund. This fund switch in NRP will prevent boating fees from supplanting WWIF fees in any capacity, which is contrary to the intent of the DNR Special Fund Workgroup.

7. Reduce NRP Field Operations funding by \$167,421 in General Funds.

Oppose. The Chairman of the House Committee on Appropriations amended the Special Fund Workgroup legislation and increased the amount of Waterway Improvement funds allowed for Marine Operations to \$1.7 million for FY '2006, as opposed to the \$1.5 million referenced by DLS.

DNR has no funding source to replace the \$167,421 in Waterway Improvement Funds (WWIF) recommended for reduction in the Natural Resources Police. Law enforcement activities will have to be reduced to cover the shortfall.

The Special Fund Workgroup recognized the need for increased WWIF support of marine operations, as the amount of support has not changed since 1992. While the workgroup initially agreed to an amount of \$1.5 million, this amount was picked arbitrarily. The Special Fund Workgroup submitted legislation to alter the amount of WWIF support for Marine Operations (HB

538 / SB 452). Chairman Conway, Co-Chairman of the Workgroup, amended the workgroup legislation to increase the marine operations support to \$1.7 million—the amount the department currently budgets to avoid the department from having to reduce marine operations in FY 2006. Environmental Matters adopted the amendments with a favorable report on the bill.

8. Reduce Fisheries Service General Fund Appropriation by \$650,000.

Oppose. The Department proposed a fishing license fee increase to only partially offset past General Fund reductions to the Fisheries Service (44 percent since FY 2002), a hardship compounded by a loss of revenue due to reduced license sales during the same time period. This reduction, if imposed, would make it necessary to scale back or eliminate basic public services currently provided by the Fisheries Service, such as shellfish management, fish passage restoration, oyster restoration, and popular education and outreach programs. The proposed reduction would also seriously compromise our ability to support commercial and recreational fisheries interests that are critically important to Maryland's economy.

Since FY2002 General Funds for Fisheries Service have been reduced by 44 percent. The proposed reduction represents an additional 20 percent cut to the general fund request. Many Fisheries Service programs currently funded by General Funds can not legally be funded by the hoped-for new revenues. Our FY 2005 \$3.2 million general fund request, when considered together with special, federal and reimburseable fund in the Fisheries Service Budget, support commercial and recreational interests that result in an economic output in Maryland of \$1 billion to \$2 billion annually. It seems to be a worthwhile investment of this small amount of general funds.

Fishing license revenues, the Service's main source of special funds, require use restrictions as in 4.745 (b) (4) (ii) for management of Sport Fisheries. The restrictions are necessary in order to comply with State law, and because they leverage three times the same amount in federal funding from the U.S. Fish and Wildlife Service (USFWS). The requirements are necessary, in part, to ensure that the state-side funds are eligible to qualify as match. So, if the fee increase is approved, the new money can only be spent in certain ways. Since the Fisheries Service's General Fund appropriation currently pays for fish and habitat restoration, and the new rev-

enues could not be legally or legitimately be applied to those efforts, the net effect will be to reduce our capacity to fulfill fish and habitat restoration responsibilities. This is of particular concern regarding oyster restoration programs, since oyster restoration is a foremost priority of the Department. To reallocate Sport Fish funds to address this need would be illegal, and the State would risk losing millions of dollars in federal funding annually.

Fishing and the use of fisheries as a means of obtaining healthful and enjoyable foods have been a preferred commercial and recreational pursuit and industry in Maryland for generations. Outdoor activities, in general, are continually at the top of the list of leisure activities enjoyed by the nation's citizens. Fishing (and boating) is in the top tier of the lists and contributes greatly to the economic mix of a healthy economy and quality of life.

The 2001 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation has estimated the economic value for recreational fishing in the State of Maryland. According to the survey, 701,000 anglers fished in Maryland that year and accumulated 7.5 million days of fishing. Anglers under the age of 16 years are not included in this estimate and add considerably to the total. Their \$557,544,005 output (retail sales) generated a total economic output of \$1,063,396,570. Related jobs were estimated to be 11,020 with payrolls of \$270,916,901 and income tax revenue to the State totaled \$10,012,837. Sales and fuel taxes paid were estimated to be \$31,3489,481.

Likewise, Maryland's commercial fisheries provide the prominent base for the well-known culture associated with fishing communities. There are many in Maryland, primarily on the Eastern Shore, but also in Southern Maryland and the Northern Chesapeake Bay region. There were 6,757 licensed commercial harvesters and 245 licensed commercial dealers in 2002. In many areas of the State, the commercial fishery, charter boat fishery, and recreational fishery all combine to define the culture and character of the area. The average commercial value statistics for the period 1997-2001 estimate the direct ex-vessel value of landed fish, crabs and shellfish to be \$47,600,000 annually with an economic output of \$100,400,000 and 2,133 related jobs exclusive of retail outlets and restaurants.